

Exhibit 300: Capital Asset Plan and Business Case Summary

Part I: Summary Information And Justification (All Capital Assets)

Section A: Overview (All Capital Assets)

1. Date of Submission: 2010-03-19 12:57:46

2. Agency: 015

3. Bureau: 45

4. Name of this Investment: IRS.GOV - Portal Environment

5. Unique Project (Investment) Identifier: 015-45-02-00-01-2529-00

6. What kind of investment will this be in FY 2011?: Operations and Maintenance

- Planning
- Full Acquisition
- Operations and Maintenance
- Mixed Life Cycle
- Multi-Agency Collaboration

7. What was the first budget year this investment was submitted to OMB? *

8. Provide a brief summary and justification for this investment, including a brief description of how this closes in part or in whole an identified agency performance gap; this description may include links to relevant information which should include relevant GAO reports, and links to relevant findings of independent audits.

The IRS currently has three existing production Web portal platforms: IRS.gov, also referred to as the Public User Portal (PUP), the Registered User Portal (RUP), and the Employee User Portal (EUP). The portal environment is the interface with external taxpayers and IRS employees. Every year, millions of taxpayers visit IRS Web sites for the information they need to file and process tax payments and refunds. In addition, tens of thousands of IRS employees rely on the sites to effectively and efficiently perform their job duties. The portals are critical to the IRS mission and foundational to IRS electronic tax administration. The maintenance and operation of the portal environment is critical to IRS business operations. The IRS.gov Web site serves as a preferred channel for interactions with the IRS and is currently the primary information source for over 120 million taxpayers and tax professionals. The site ranks highly in several categories – winner of multiple industry awards; one of the busiest Web sites in the world; and a top-ten rated federal Web site. It has adapted over the years to the changing needs of the taxpaying population and has been the leading component of web products and services provided by the IRS. The RUP that allows registered individuals and third-party users (registration and authentication required) and other individual taxpayers or their representatives (authentication required) to access selected tax processing and other sensitive systems and data. User interactions are encrypted from the user's workstation or system to the portal across the Internet or via direct circuits. The RUP also supports IRS secure extranet connections to registered and authorized external entities, such as the exchange of bulk files between the IRS and large corporations. The EUP allows IRS employees to access IRS data and systems, such as tax administration processing systems, financial information systems, and other data and applications, including mission critical applications. Registration and authentication are required for access to sensitive and mission critical applications. All user interactions with those systems are encrypted from workstation to portal across the IRS internal network. The scope of this investment is to continue to maintain and operate secure and reliable portals to meet the goals of the agency.

- a. Provide here the date of any approved rebaselining within the past year, the date for the most recent (or planned) alternatives analysis for this investment, and whether this investment has a risk management plan and risk register.**

9. Did the Agency's Executive/Investment Committee approve this request? *

a. If "yes," what was the date of this approval? *

10. Contact information of Program/Project Manager?

- **Name:** *
- **Phone Number:** *
- **Email:** *

11. What project management qualifications does the Project Manager have? (per FAC-P/PM)? *

- Project manager has been validated according to FAC-PMPM or DAWIA criteria as qualified for this investment.
- Project manager qualifications according to FAC-P/PM or DAWIA criteria is under review for this investment.
- Project manager assigned to investment, but does not meet requirements according to FAC-P/OM or DAWIA criteria.
- Project manager assigned but qualification status review has not yet started.
- No project manager has yet been assigned to this investment.

12. If this investment is a financial management system, then please fill out the following as reported in the most recent financial systems inventory (FMSI):

Financial management system name(s)	System acronym	Unique Project Identifier (UPI) number
*	*	*

a. If this investment is a financial management system AND the investment is part of the core financial system then select the primary FFMIA compliance area that this investment addresses (choose only one): *

- computer system security requirement;
- internal control system requirement;
- core financial system requirement according to FSIO standards;
- Federal accounting standard;
- U.S. Government Standard General Ledger at the Transaction Level;
- this is a core financial system, but does not address a FFMIA compliance area;
- Not a core financial system; does not need to comply with FFMIA

Section B: Summary of Funding (Budget Authority for Capital Assets)

1.

Table 1: SUMMARY OF FUNDING FOR PROJECT PHASES (REPORTED IN MILLIONS) (Estimates for BY+1 and beyond are for planning purposes only and do not represent budget decisions)									
	PY1 and earlier	PY 2009	CY 2010	BY 2011	BY+1 2012	BY+2 2013	BY+3 2014	BY+4 and beyond	Total
Planning:	*	*	*	*	*	*	*	*	*
Acquisition:	*	*	*	*	*	*	*	*	*
Subtotal Planning & Acquisition:	*	*	*	*	*	*	*	*	*
Operations & Maintenance:	*	*	*	*	*	*	*	*	*
Disposition Costs (optional):	*	*	*	*	*	*	*	*	*
SUBTOTAL:	*	*	*	*	*	*	*	*	*
Government FTE Costs should not be included in the amounts provided above.									
Government FTE Costs	*	*	*	*	*	*	*	*	*
Number of FTE represented by Costs:	*	*	*	*	*	*	*	*	*
TOTAL(including FTE costs)	*	*	*	*	*	*	*	*	*

2. If the summary of funding has changed from the FY 2010 President's Budget request, briefly explain those changes:

*

Section C: Acquisition/Contract Strategy (All Capital Assets)

1.

Table 1: Contracts/Task Orders Table

Contract or Task Order Number	Type of Contract/Task Order (In accordance with FAR Part 16)	Has the contract been awarded (Y/N)	If so what is the date of the award? If not, what is the planned award date?	Start date of Contract/Task Order	End date of Contract/Task Order	Total Value of Contract/Task Order (M)	Is this an Interagency Acquisition? (Y/N)	Is it performance based? (Y/N)	Competitively awarded? (Y/N)	What, if any, alternative financing option is being used? (ESPC, UESC, EUL, N/A)	Is EVM in the contract? (Y/N)
NONE											

2. If earned value is not required or will not be a contract requirement for any of the contracts or task orders above, explain why:

*

3. Is there an acquisition plan which reflects the requirements of FAR Subpart 7.1 and has been approved in accordance with agency requirements? *

a. If "yes," what is the date? *

Section D: Performance Information (All Capital Assets)

Table 1: Performance Information Table

Fiscal Year	Strategic Goal(s) Supported	Measurement Area	Measurement Grouping	Measurement Indicator	Baseline	Target	Actual Results
2011	Effectively Managed U.S. Government Finances	*	*	100% of the required Exit Criteria are met to establish and build the new IRS web environment	No Baseline(this is a newly established program)	100% completed as planned	TBD
2011	Effectively Managed U.S. Government Finances	*	*	100% of customer-facing Service level objectives for responding to IRS.GOV Help Desk Calls, emails, chats, and voice mails. Measured monthly	100%	100%	TBD
2011	Effectively Managed U.S. Government Finances	*	*	99% of all IRS.gov website search queries have a response time of 3 seconds or less	TBD	99%	TBD
2011	Effectively Managed U.S. Government Finances	*	*	95% of all requests for general tax content and tax products on IRS.gov can retrieve relevant material in the first 3 search results	TBD	95%	TBD
2011	Effectively Managed U.S. Government Finances	*	*	Surveys are conducted annually for Help Desk calls and are utilized to improve customer satisfaction	Yes	Yes	TBD
2011	Effectively Managed U.S. Government Finances	*	*	Number of major security incidents in the infrastructure of the web environment	0 incidents	0 incidents	TBD
2011	Effectively Managed U.S. Government Finances	*	*	The IRS.gov website is available for users at a minimum of 99.9% of the time, 24x7, including peak tax seasons.	99.9% 24x7	99.9%, 24x7	TBD
2011	Effectively Managed U.S. Government	*	*	95% of all new applications must be	TBD	95%	TBD

Table 1: Performance Information Table

Fiscal Year	Strategic Goal(s) Supported	Measurement Area	Measurement Grouping	Measurement Indicator	Baseline	Target	Actual Results
	Finances			successfully deployed in the IRS.gov production environment within defined timeframes			
2011	Effectively Managed U.S. Government Finances	*	*	95% of new, upgrade or maintenance releases of hardware or software that impact the web hosting environment are implemented within defined timeframes.	95%	95%	TBD

Part III: For "Operation and Maintenance" investments ONLY (Steady State)

Section A: Cost and Schedule Performance (All Capital Assets)

1. Comparison of Actual Work Completed and Actual Costs to Current Approved Baseline								
Description of Milestones	Planned Cost (\$M)	Actual Cost (\$M)	Planned Start Date	Actual Start Date	Planned Completion Date	Actual Completion Date	Planned Percent Complete	Actual Percent Complete
Operate and Maintain the IRS Web Environment	\$42.3	\$31.9	2009-10-01	2009-10-01	2010-09-30		66.66%	66.66%

* - Indicates data is redacted.